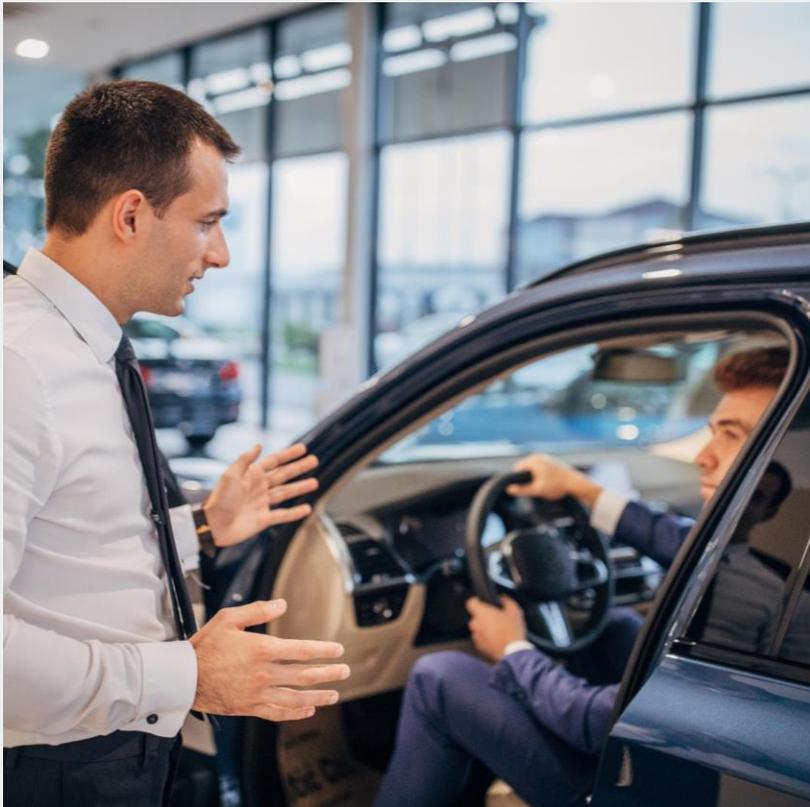


CARPE DIEM: DAILY CHECKLIST FOR DESK MANAGERS

Essential tasks to optimize desk management efficiency daily

Carpe Diem

How a desk manager *seizes the day* utilizing VinSolutions

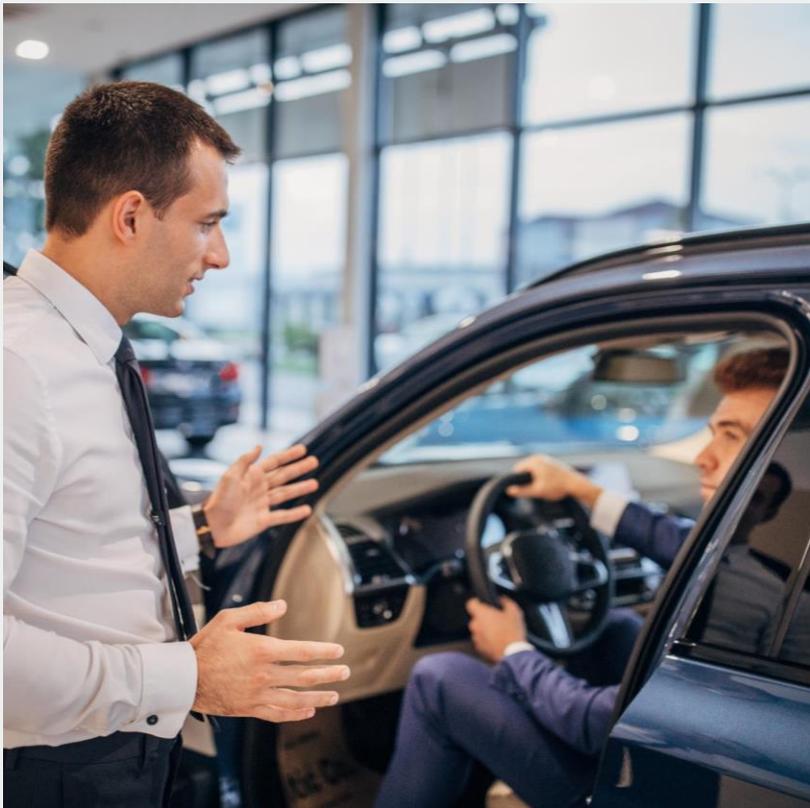


- Consider: a dealership can only sell a car to one of three people:

- An unsold lead
- A previously sold customer
- Someone on the service drive

Carpe Diem

How a desk manager *seizes the day* utilizing VinSolutions

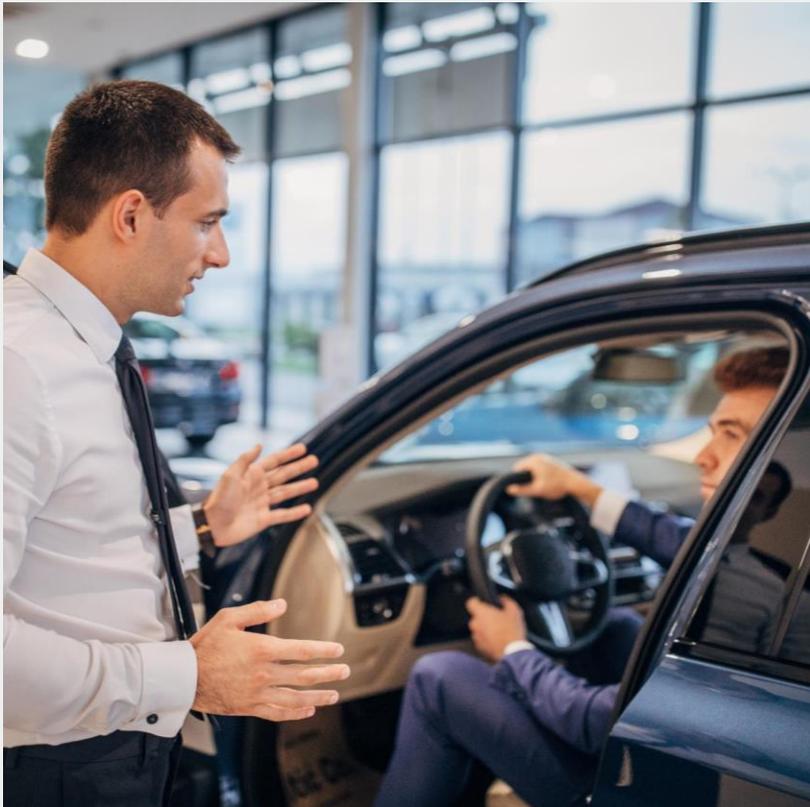


- Consider: the only thing we control in the car industry is the **number of appointments that show**. We cannot control:

- Tariffs
- Inventory
- Interest rates
- The value of the trade
- The income or credit score of the customer
- The weather or world events
- The cost of or the allocation of the vehicles.

Carpe Diem

How a desk manager *seizes the day* utilizing VinSolutions

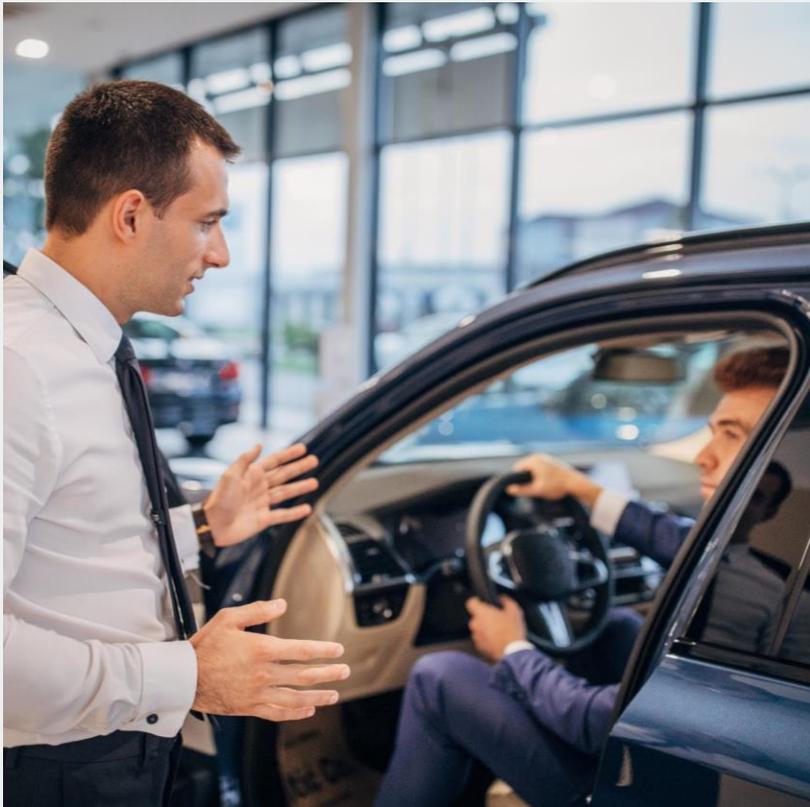


- Consider: sales always comes down to three bedrocks:

- People
- Product
- And Process

Carpe Diem

How a desk manager *seizes the day* utilizing VinSolutions



- Consider: the only thing that really matters, therefore is “process”

- You already have your people
- You already have the product
- ***Focus on the process***

Carpe Diem



What Cox knows:

There are about 18,000 new car dealerships and another 40,000 used car dealerships in America. Cox Auto has a business relationship with about 90% of them (Dealertrack, VinSolutions, Manheim, Autotrader, Kelly Blue Book, vAuto, Homenet, Xtime). Cox knows *why* some dealerships outperform others.

Carpe Diem is an amalgamation of the best practices of the top 1%

It is not rocket science. It is simple process. It costs no extra money. It is just a better way to use your existing tools.

Based on Aviation

Why do planes rarely crash? Pilots use a checklist! Carpe Diem is a checklist for desk manager.

MORNING ROUTINE

Carpe Diem



- Start with the **Dealer Dashboard** (CRM>Dashboard>Dealer Dashboard).
 - Check Key Performance Indicators, assuring no one is currently “*sleeping*” on the showroom floor (Open Showroom Visits) and all in-bound communications (Unanswered Communications) have been answered.
 - Look at “Buying Signals” indicators to discover who of your previous customers is currently shopping ***somewhere else***.
 - Review each booked appointment, assuring they have been confirmed!

Carpe Diem



- Then head to **Insights**, our reporting tool
 - Launch **Yesterday's Action Items** (Insights>All>Yesterday's Action Items). On Mondays, instead launch **The Monday Report**.
 - Review each opportunity the dealership has received in the last 24 hours from the three primary sources:
 - walk-ins,
 - phone-ups
 - Internet Leads.
 - Recheck for unanswered in-bound e-mails.
 - Review outbound activities to assure each sales consultant is adhering to dealership expectations for outbound communications.

Carpe Diem



- Launch **Leads out of Coverage** (Insights>Shared with Me>Leads Out of Coverage (2) no KBB)
 - Unearth *active I-Leads from the last 30 days* with whom there has been *no actual contact in the last 3 days*.

Carpe Diem



- Launch **The Cliff** (Insights>Shared with Me> "The Cliff" -- Active Leads 10 to 60 days no attempted contact in last 10 days no KBB)
- Review *active leads from all sources from the last 60 days with whom there has been no contact in the last 10 days.*

Carpe Diem



- Now head to the **Service Drive**. Click Dashboard, then Service Appointment Dashboard (CRM>Dashboard>Service Appointments).
 - Are any leads unassigned (“Your Service Friends at...)?
 - Which vehicles look the most desirable?
 - Which customer is most in need of a replacement vehicle?

Get sales reps to focus on their own Coaching Dashboard

- The Coaching Dashboard contains all a sales rep needs to sell a car today!
- The Coaching Dashboard assures that no leads land on The Cliff or Leads out of Coverage!



Service Drive Opportunities

- Now head to the **Service Drive**. Click Dashboard, then Service Appointment Dashboard (CRM>Dashboard>Service Appointments).
 - Are any leads unassigned (“Your Service Friends at...)?
 - Which vehicles look the most desirable?
 - Which customer is most in need of a replacement vehicle?

Target—The pathway Previously Sold Customers

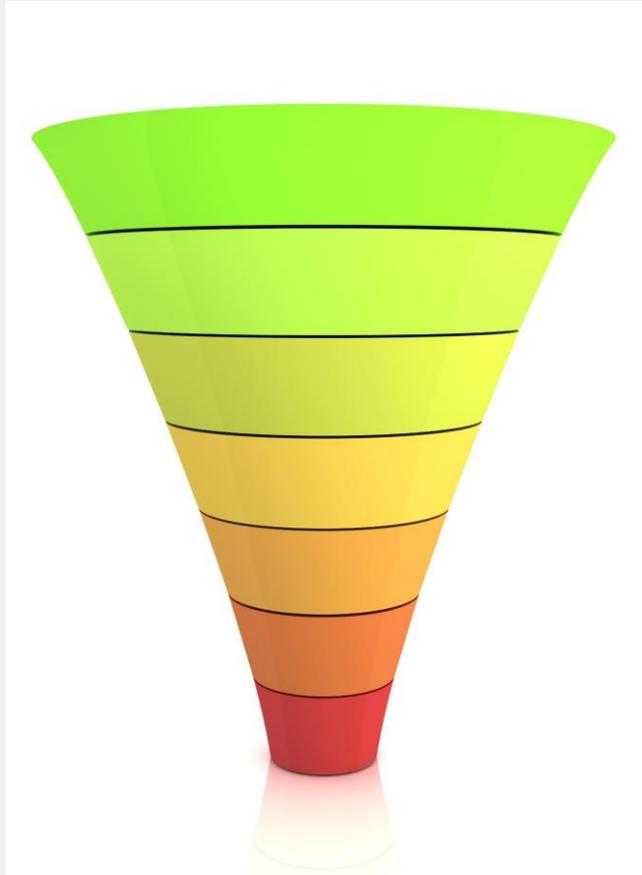


CRM>Customers>Target

Find customers with favorable equity positions

Find customers who are nearing end of term

Performance Metrics



50-25-2-1 Model Overview

The 50-25-2-1 model tracks calls, connects, appointments, and sales effectively.

80-40-80-20-10 Sales Funnel

This model details contact, appointment, confirmation, show, and sale percentages clearly.

Importance of Metric Tracking

Tracking metrics helps set goals and identify areas needing improvement.

Optimizing Dealership Strategies

Consistent monitoring of metrics enables strategy optimization and improved results.